# Evergreen Indiana Cataloging break-out session

Cleaning up

# Why do I need to do cleanups?

Since only one bibliographic record for each unique entity should be entered into the database, the title record is "owned" by all participating libraries, and catalogers from any library may edit a bibliographic record, if it is called for. Adding, deleting, or editing a bibliographic title record should be undertaken in accordance with **Evergreen Indiana Cataloging Policy and** Procedures.



#### How do I clean-up records?

- Only an Evergreen Indiana Certified Cataloger (Cat-1) may import, overlay, merge, edit, create and delete MARC records.
- To become certified, you must successfully complete the Evergreen Indiana Advanced Cataloging class.

### How did they get so messy?

New records (easy to find, easy to fix!)

New libraries (easy to fix, not as easy to find)

De-dupe projects (expert level: HIGH!)

### Delete, overlay, merge, transfer

Evergreen Indiana cataloging manual

http://www.in.gov/library/5089.htm

Deleting bib records Chapter 18

Overlaying records Chapter 13

Merging records Chapter 19

Transfering holdings Chapter 10

#### Deleting

- When deleting records from Evergreen Indiana, it is extremely important to use caution. Be certain that you are deleting what you wish to delete. If you delete the only item attached to particular bibliographic record in the Evergreen Indiana system, the bibliographic record will be deleted from the system. This can be done even by a cataloger with only copy level permissions.
- Only bibliographic records with no holdings may be deleted.

#### Overlaying

- Overlaying a record is the process of importing a new MARC record to replace a record currently in the system. This would be done if the existing record is insufficient in some way, needs updated, or to replace temporary records.
- When a record is overlaid, any holdings that were attached to the original record will be attached to the replacement. Essentially the new record takes the place in the system of the record being overlaid.

### Merging

- The merge function allows you to eliminate duplicate bibliographic records. You select the best record and the holdings and any patron holds from the other records are transferred to the lead record selected. The merged records which were not selected as the lead are deleted from the catalog.
- When merging records, take care to ensure that the records do indeed match. Please use the same criteria for matching records to be merged that you would use to catalog an item. If there is any question as to whether or not the records should be merged, do not merge them. It is much easier to merge records than to unmerge them.

# Transferring

- Transferring allows you to move holdings from one record or branch to another. This is useful when items have been attached to the wrong record during migration, when they have been mis-cataloged or mis-merged, or when you have items that will be transferred permanently to a different branch of your library.
- Transferring volumes means transferring a call number and all items attached to that call number simultaneously to another catalog record or another library.
- Transferring items means transferring a single specific item without the call number to a different call number. It can be a different call number on the same record or a call number on a different record

# Reports



#### Reports

- My Folders
- Templates
- Reports
- Output
- Shared Folders
- Templates
- Reports
- Output

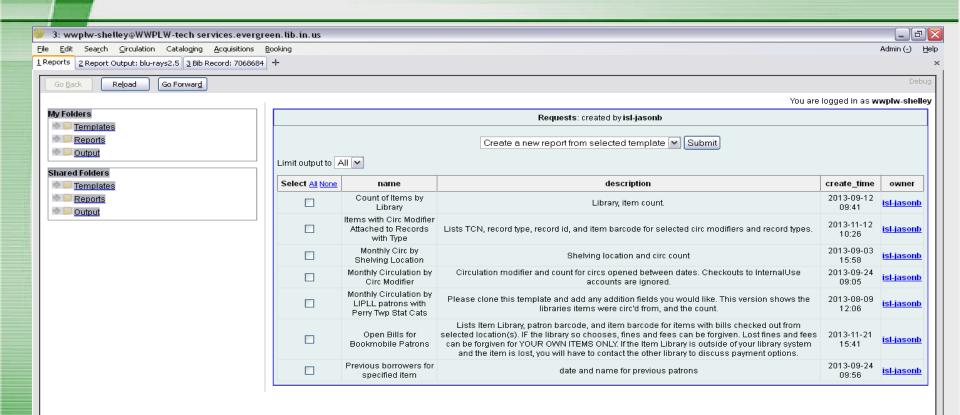
#### How to find what you want

#### **Shared Folders**

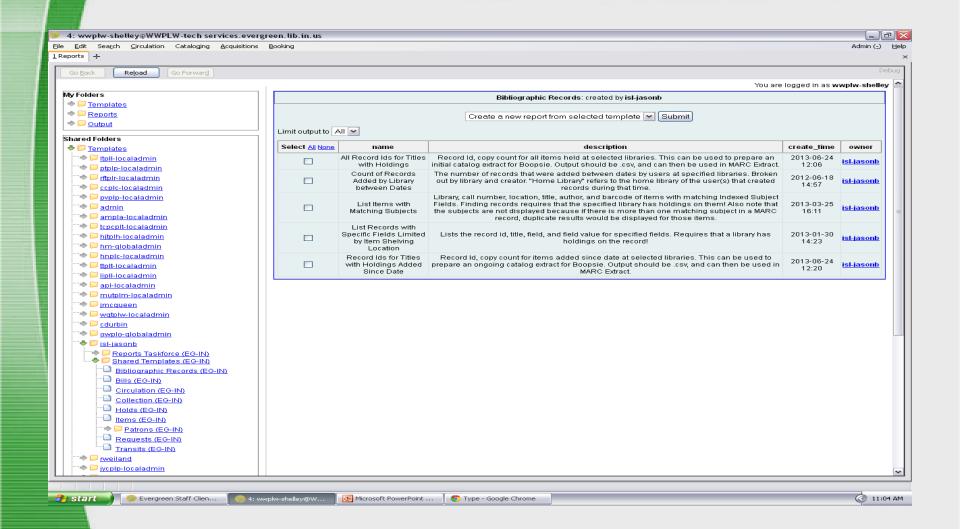
```
Templates
isl-jasonb
 Reports Taskforce (EG-IN)
 Shared Templates (EG-IN)
      Bibliographic Records (EG-IN)
      Bills (EG-IN)
      Circulation (EG-IN)
      Collection (EG-IN)
      Holds (EG-IN)
      Items (EG-IN)
      Patrons (EG-IN)
      Requests (EG-IN)
      Transits (EG-IN)
```



#### Fix de-dupes



#### Fix call #s



#### For more FAQs

Questions about cataloging in Evergreen can be posted to the ListServ:

evergreen indiana-catalog@lists.in.gov

or you can email any El Cataloging Committee member.

Cataloging tips of the week can be viewed online at

http://www.in.gov/library/3700.htm

